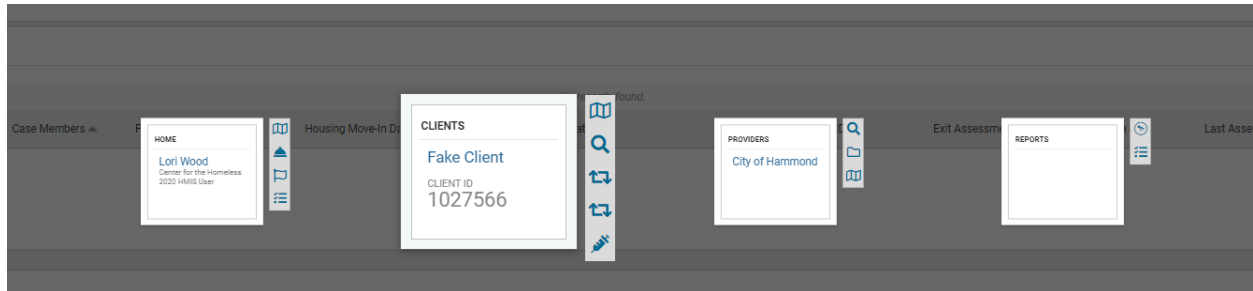


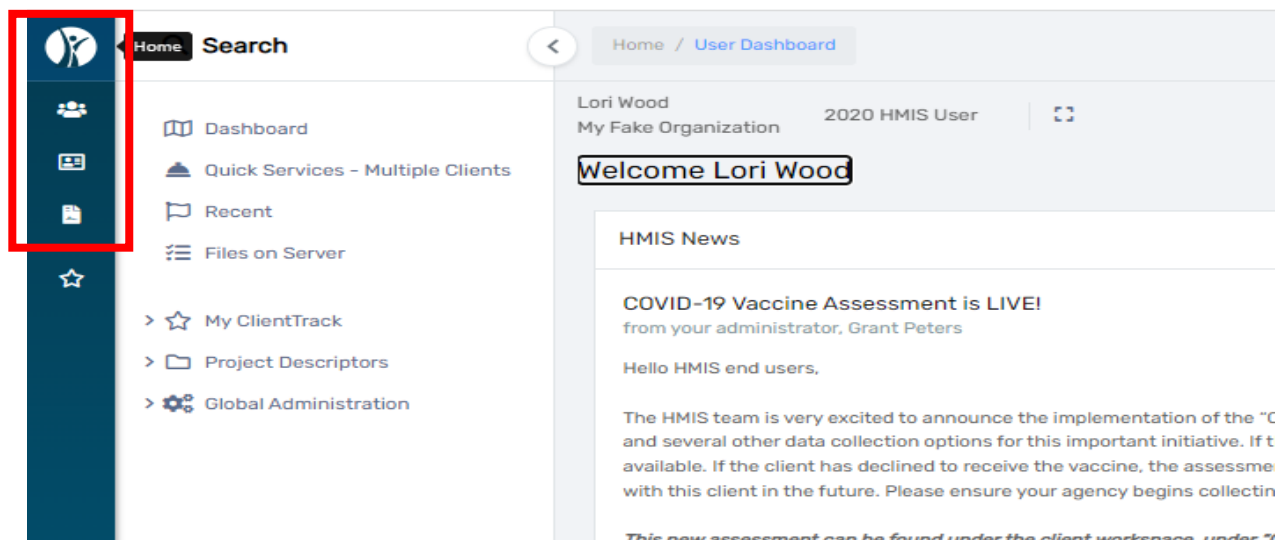
## Top Five System Changes for the Upgrade Launch

### HMIS and DV ClientTrack

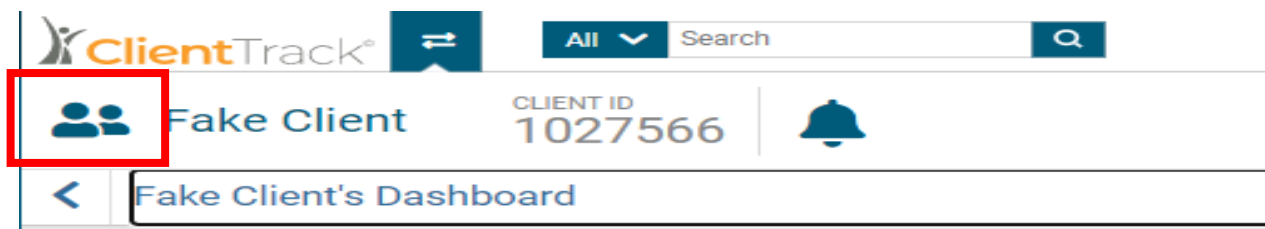
1. The **“Carousel”** menu (as pictured below) for selecting **“Workspaces”** no longer exists.




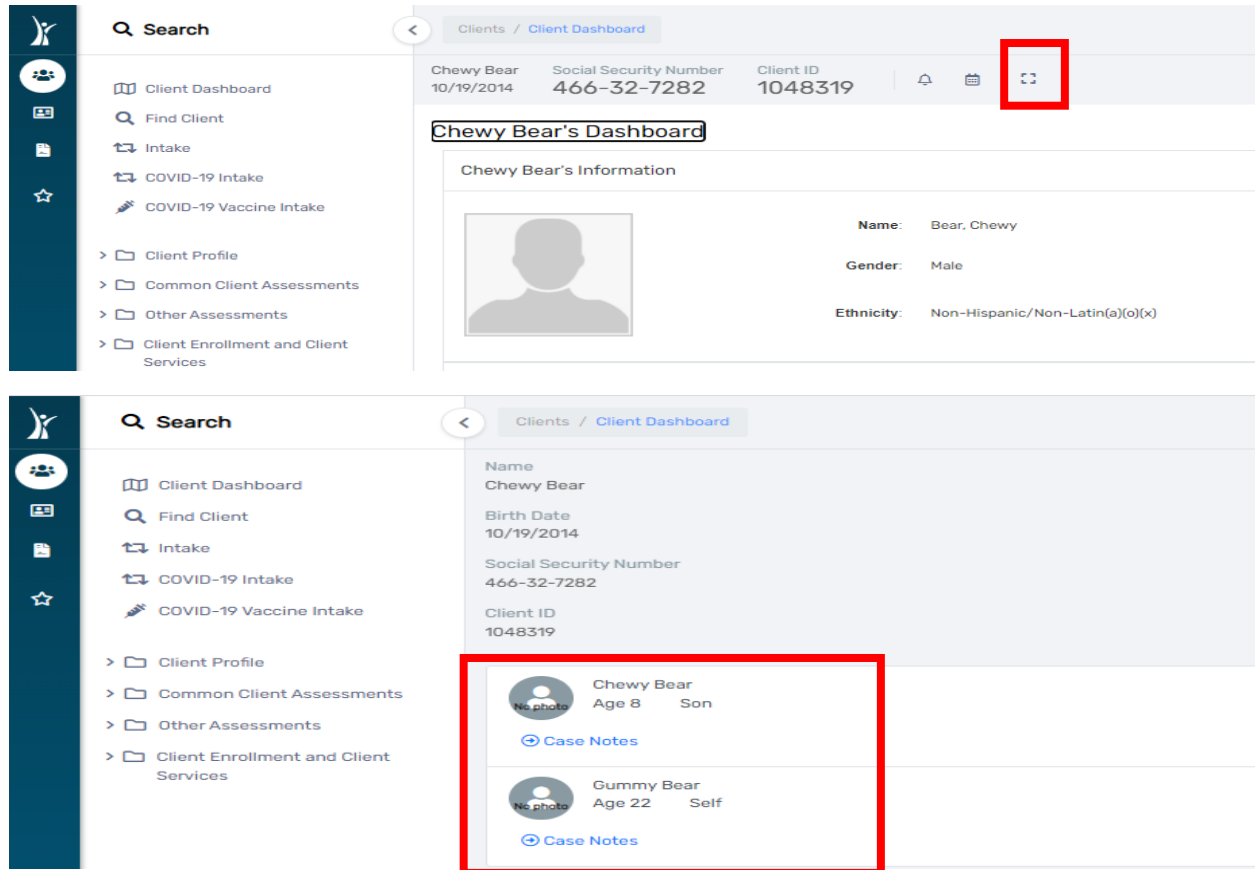
2. Users will now navigate between the four **“Workspaces”** by selecting the appropriate **“Workspace”** icon located on the left margin of the screen.



3. The **“Family”** icon for viewing the members of a household no longer exists.



4. From the Client dashboard screen, users will now click on the  icon to view the members of a household.



Search

Clients / Client Dashboard

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

**Chewy Bear's Dashboard**

Chewy Bear's Information

Name: Bear, Chewy

Gender: Male

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x)

Client Dashboard

Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Name: Chewy Bear

Birth Date: 10/19/2014

Social Security Number: 466-32-7282

Client ID: 1048319

Chewy Bear Age 8 Son

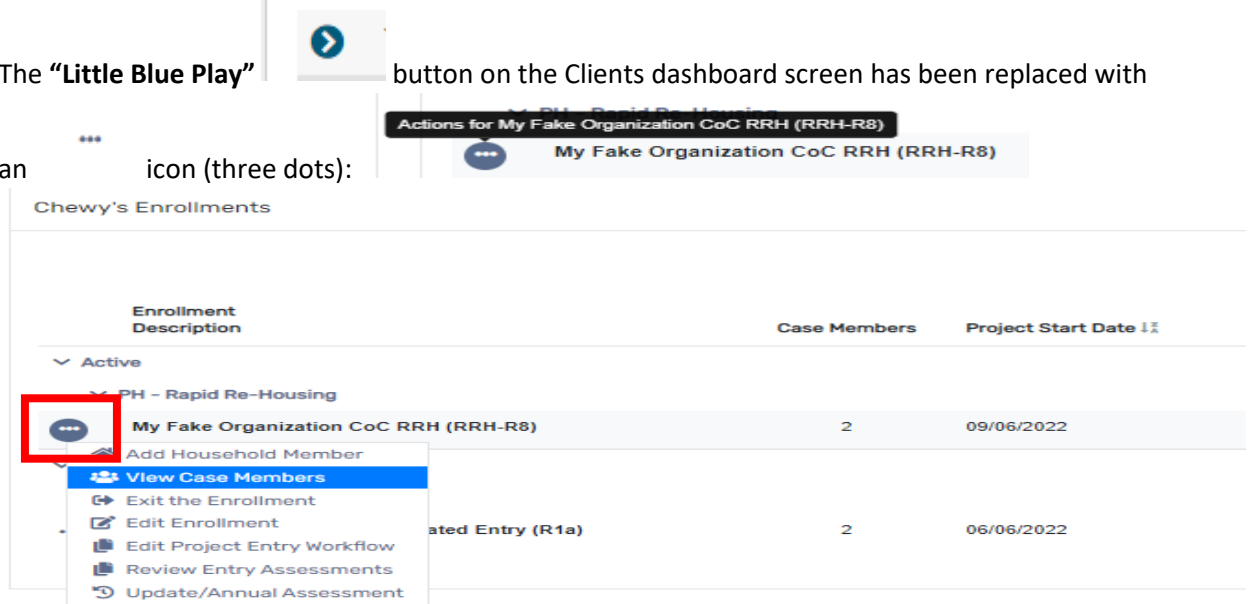
Case Notes

Gummy Bear Age 22 Self

Case Notes

5. The “Little Blue Play” button on the Clients dashboard screen has been replaced with

an icon (three dots):



Actions for My Fake Organization CoC RRH (RRH-R8)

My Fake Organization CoC RRH (RRH-R8)

Chewy's Enrollments

Enrollment Description	Case Members	Project Start Date
PH - Rapid Re-Housing		
My Fake Organization CoC RRH (RRH-R8)	2	09/06/2022
ated Entry (R1a)	2	06/06/2022

View Case Members

Exit the Enrollment

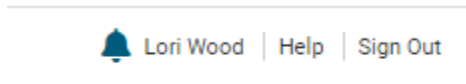
Edit Enrollment

Edit Project Entry Workflow

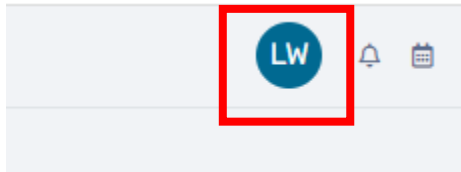
Review Entry Assessments

Update/Annual Assessment

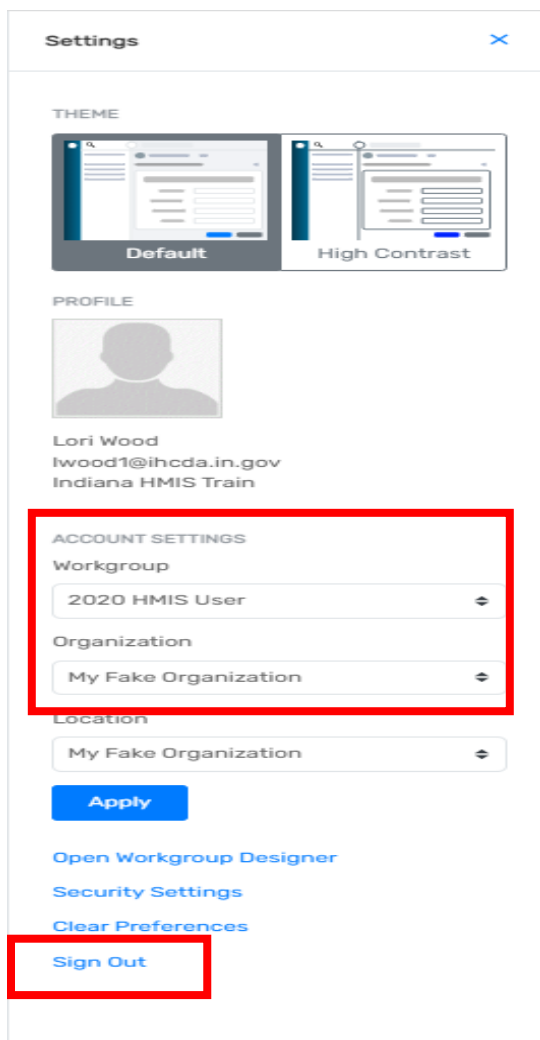
6. Your **“Username, Help, and Sign Out”** options no longer display in the upper right corner as seen below.



7. To change the **“Workgroup and Organization”** (for users who have Coordinated Workgroup and Organization access) and to **“Sign Out”** of the system, click on your initials located in the upper right corner of the screen as seen below.



8. After clicking on your initials, a window will appear, and you can select the **“Workgroup and Organization”** as well as the **“Sign Out”** function when logging out of HMIS or DV ClientTrack.



9. The system no longer allows you to leave a workflow (intake/exit) unless the **“Pause”** or **“Cancel”** icon is selected.

Intake (2298)  Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319   

 Add or Edit

 Basic Client Information

 Family Members

 Program Enrollment

 Pause  Cancel

Please visit the HMIS and DV ClientTrack Balance of State website for specific How to Guides on specific functions.

<https://www.in.gov/ihcda/indiana-balance-of-state-continuum-of-care/hmis-clienttrack-and-dv-clienttrack/>

If a How to Guide is not available for your data entry question, please email your respective helpdesk for assistance.

[DVHelpDesk@ihcda.in.gov](mailto:DVHelpDesk@ihcda.in.gov)

[HMISHelpDesk@ihcda.in.gov](mailto:HMISHelpDesk@ihcda.in.gov)